

Biodiversity Barometer 2013

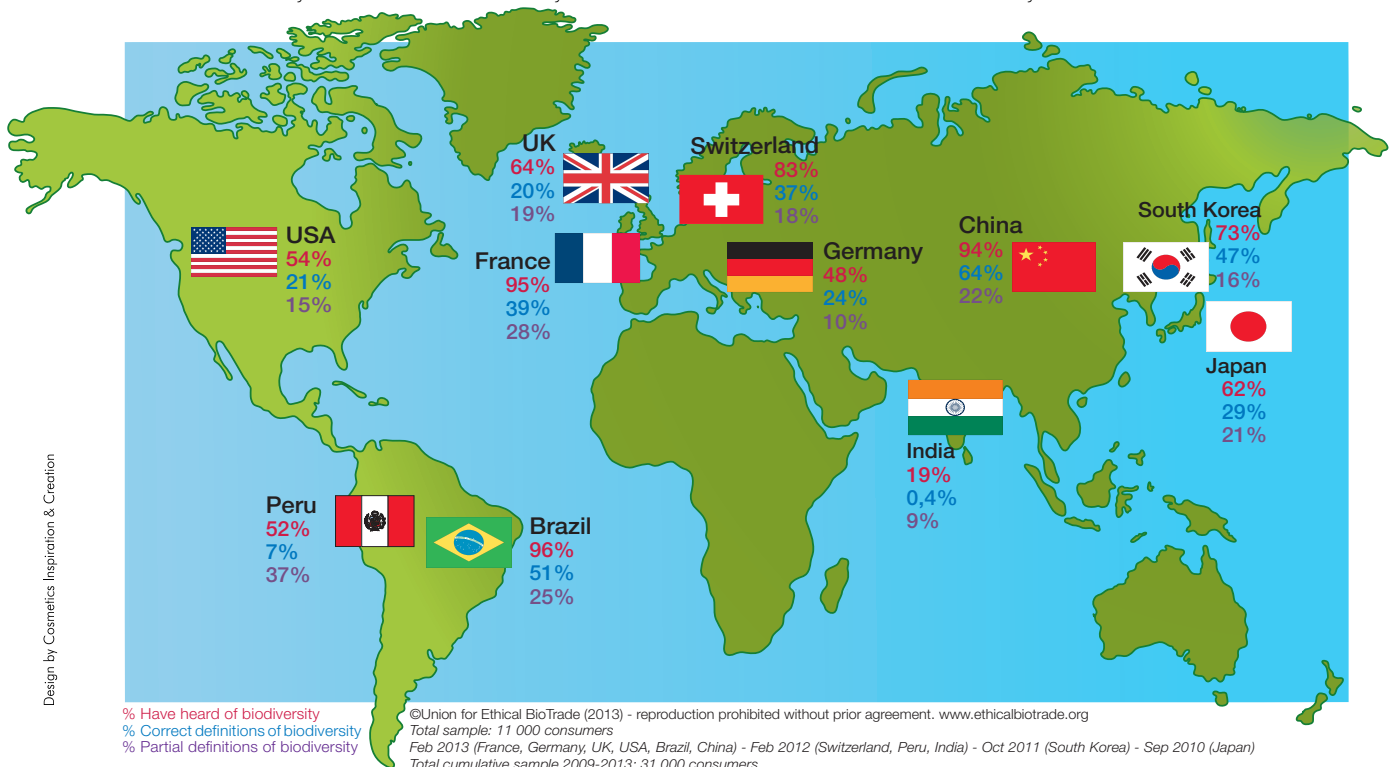
5 years of UEBT Biodiversity Barometer

Since 2009, UEBT has been tracking biodiversity awareness around the world. To date 31.000 consumers, spread over 11 countries, have been interviewed. They are prodded about their understanding of biodiversity and related purchasing attitudes. UEBT also annually tracks corporate communication and reporting on biodiversity of beauty companies. The UEBT biodiversity barometer is now recognized by business as a valuable source of information. It is also used to track global biodiversity awareness targets that the United Nations have set for 2020.

“ The UEBT Biodiversity Barometer offers valuable consumer insights in biodiversity awareness and their expectations on biodiversity sourcing practices.”

*Denise Alves, Director of Sustainability at
Natura Brasil*

UEBT Biodiversity Barometer - Biodiversity awareness around the world - IPSOS survey



67% of consumers around the world
had heard about biodiversity over the
last 5 years (31,000 consumers in 11 countries)

Biodiversity awareness around the world

Biodiversity is a truly global concept. An average of 67% of 11,000 consumers in 11 countries has heard about biodiversity. Over 80% would like to know more about how companies source natural ingredients. Biodiversity awareness is particularly high in emerging economies like Brazil and China, highlighting the growing importance of biodiversity for business.



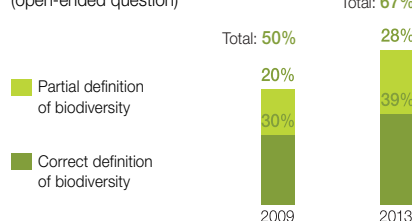
Biodiversity awareness slowly growing



2013 reveals steady growth in understanding of biodiversity and related notions. The number of correct and partially correct definitions has grown since 2009. Traditional media like television or magazines are the main source of information.

How people define biodiversity

In your opinion, what does biodiversity mean? (open-ended question)



Basis: Among those who have heard of biodiversity - 4 countries tracked since 2009: France, Germany, UK, USA.

France:



95% heard of biodiversity. High overall awareness of sustainability:

98% knows of sustainable development, deforestation, endangered species and fair trade.

UK:



High awareness of ethics and trade (over 80%). Slightly less awareness of environmental terms (around 70%).

Brazil:



96% awareness of biodiversity in Brazil. Correct definitions of biodiversity slowly rises. Awareness is driven by documentaries, school and advertising.

Germany:



Strong rise in consumers awareness of biodiversity.

29% in 2009, 48% in 2013. 91% knows related terms like 'preservation of ecosystems'.

USA:



Biodiversity awareness is slowly rising among consumers (48% in 2009 to 54% in 2013). Correct definitions amongst respondents went from 26% to 39%.

China:



64% of Chinese consumers can define biodiversity. The highest rate measured over last 5 years. Little confusion exists about notions like organic in China.

Awareness of biodiversity in 2013

96% in Brazil, **95%** in France, **94%** in China.

Ethical sourcing matters around the world

Consumer trust in beauty companies remains low: 42% in the USA and Europe, and 64% in emerging economies. Confidence on ethical sourcing is even lower, e.g. 36% in USA and Europe. A large majority (87%) of consumers wants to receive more information on biodiversity sourcing practices. 84% say they would stop buying from brands that do not source ethically: consequences can be severe if consumers put their money where their mouth is.

Consumers' vision of the Beauty Industry	Total	Western countries	Brazil + China
I trust companies in the cosmetics and personal care sector	50%	42%	64%
I am confident that the cosmetics and personal care industry pays serious attention to ethical sourcing	46%	36%	64%
I would like to be better informed about how cosmetics and personal care companies source their natural ingredients	87%	82%	95%
I would stop buying if I knew that they do not take good care of environmental and ethical practices	84%	80%	92%

Basis: Respondents - Total agree

Feb 2013 - Western Countries: France, Germany, UK, USA / Developed countries: Brazil, China



High Chinese awareness of biodiversity

94% of surveyed Chinese say they know what biodiversity means. 64% can define it correctly, which is the highest rate measured in the UEBT Biodiversity Barometer over the last 5 years. Main sources of awareness of biodiversity are: TV programs, web sites or blogs, and education.

64% of Chinese define biodiversity correctly

Blogs and web-sites are an important source of information in China

"The survey results do not come as a surprise because in recent years, levels of governments and civil society in China have undertaken tremendous activities for communicating and raising awareness of biodiversity issues. All relevant information related to biodiversity issues has been effectively communicated to the general public through various means, such as internet, TV and printings."

Ministry of Environmental Protection, China

Information is key

Over 90% of surveyed Chinese are aware of notions related to biodiversity.

95% want more information and 94% say they would stop buying from a brand not sourcing ethically. With an increasingly active civil society in China and internet savvy consumers, transparent communication is gaining importance for business.



Have you heard of the following notions?

		Total countries
Deforestation	98%	92%
Preservation of Natural Ecosystems	98%	88%
Endangered Species	97%	95%
Sustainable Development	97%	88%
Conservation of Biodiversity	96%	69%
Fair Trade	95%	92%
Respect and Protection of Traditional Knowledge	94%	94%

Basis: Total Yes - Total sample - Feb 2013 - France, Germany, UK, USA, Brazil, China

Natural ingredients matter in China

98% of Chinese consumers buy cosmetic products that use natural ingredients. Again, the highest rate of all surveyed countries.

Chinese say they pay close attention to the source of the ingredients for food (94%) and beauty products (89%).

Chinese consumers also say they pay a lot of attention to environmental and ethical labels (respectively 95% and 89%).

84% of Chinese value independent verification of brands

"Nature plays an important role in the Chinese culture and natural ingredients are a cornerstone of beauty product appeal"

Rémy Oudghiri, IPSOS



Biodiversity: which brands care in view of the consumer?

When asked to name 3 brands that respect biodiversity, many consumers name beauty, food and retail companies. Yet, not one single brand stands out globally. Only in Brazil there is a brand with a very strong biodiversity identity: half (49%) of the consumers pointed to Natura Cosmetics, the national market leader in the cosmetics market. The Body Shop (23%) is most mentioned brand in the UK. Yves Rocher is most mentioned in France (23%).

What are the three brands you consider as making the most efforts to respect Biodiversity?



1 Yves Rocher
2 Danone
3 Nestlé



1 Alnatura
2 Yves Rocher
3 Tchibo



1 The Body Shop
2 Coop
3 Marks & Spencer



1 Kashi
2 P&G
3 Johnson & Johnson



1 Natura
2 Avon
3 O Boticario



1 Yili
2 Mengniu
3 Amway

Basis: Brands / companies quoted highest - Feb 2013: France, Germany, UK, USA, Brazil, China



Today consumers only associate a few companies with biodiversity. This offers a real opportunity for those that want to position themselves on this emerging notion.



Biodiversity reporting on the rise

Since 2009 the top 100 beauty companies pay increasing attention to biodiversity in their corporate reporting and web-sites. In 2009, 13% of companies mentioned biodiversity, in 2013 32%. The twenty largest beauty companies score much higher: 80% mentioned biodiversity in their corporate sustainability reporting, and 75% indicated that they look at how their supply chains impact biodiversity.

Yet, the beauty industry lags behind the food industry. A similar analysis of the top 100 food companies shows that 91% of the food companies mention sustainable development in their annual reporting, 53% refer to biodiversity, and 31% pay attention to biodiversity in the supply chain.

What are companies saying about biodiversity?

	Beauty companies			Food companies	
	Top 100 2009	Top 100 2013	variation	Top 20 2013	Top 100 2013
Companies reporting on sustainable development	44%	53%	+ 9	100%	91%
Companies reporting on biodiversity	13%	32%	+ 19	80%	53%
Companies reporting on biodiversity sourcing practices	9%	24%	+ 15	75%	31%
Companies mentioning biodiversity related issues like traditional knowledge and intellectual property rights	2%	6%	+ 4	4%	6%

Basis: UEBT analysis based on WWD top 100 beauty companies (August 2012) and Food Engineering top 100 food and beverage companies (October 2012).










Ethical sourcing of biodiversity gaining ground

Although correct definitions of biodiversity are still relatively low, the awareness related to notions related to biodiversity is higher and growing:

Over **90%** of consumers heard about notions related to biodiversity in 2013, like endangered species, fair trade, or preservation of natural ecosystems.

Since 2009 is a very strong increase (up to 31 percent points) in notions like ethical sharing of benefits, respect of traditional knowledge, equitable sharing of benefits, or payments of fair prices.

High awareness exists in emerging countries of notions like respect of traditional knowledge (91% and 94% for Brazil and China) and conservation of biodiversity (at 92% and 94%).

	Total countries	Highest score country	%
Endangered Species	95%		98%
Fair Trade	92%		98%
Deforestation	92%	 	98%
Preservation of Natural Ecosystems	88%		98%
Sustainable Development	88%		94%
Respect and Protection of Traditional Knowledge	79%		94%

Basis: Total Yes - Total sample - Feb 2013 - France, Germany, UK, USA, Brazil, China

In France, Germany and UK, notions such as **respect of traditional knowledge and ethical sourcing of biodiversity** have strongly increased in 2013

"Biodiversity is all varieties of life forms that we can find on earth."



Where do natural ingredients come from?

84% of surveyed consumers say they buy beauty products that contain natural ingredients. Interest is particularly strong in China (98%) and Brazil (95%).

68% of consumers say they pay close attention to knowing the origin of natural ingredients in products.

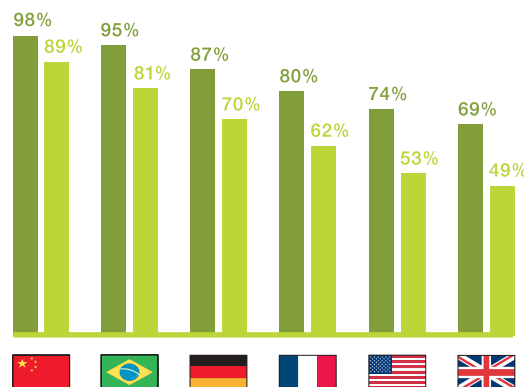
Independent control valued

81% of consumers say they have more faith in sourcing practices that are externally verified.

72% say they pay close attention to environmental and ethical labels when buying a product.

Importance of natural ingredients for consumers

% Buy Cosmetics & Personal care that use natural ingredients
 % Pay close attention to where the ingredients come from



Basis: All respondents - Feb 2013 - France, Germany, UK, USA, Brazil, China



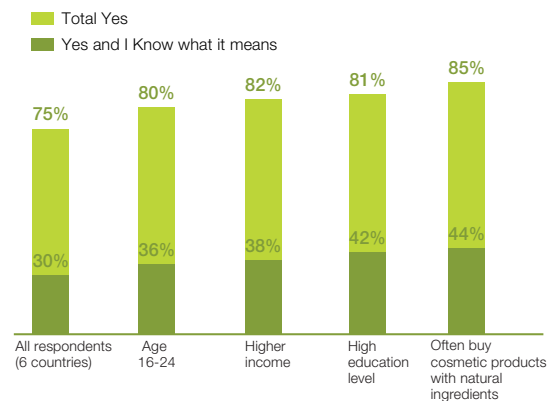
Insight in demographics

Young people are more aware about biodiversity than older people. Men tend to be slightly more aware than women.

Income and education influence biodiversity awareness rates and other sustainability notions.

Those that consume natural cosmetics have higher awareness on biodiversity and related notions.

Biodiversity - Who are the best informed population groups?



Basis: Total Sample - Feb 2013 - France, Germany, UK, USA, Brazil, China

UEBT Biodiversity Barometer 2013 methodology

Fieldwork: from 01/29/2013 to 02/14/2013.

Online interviews of 1000 consumers in each country (Omnibus in France, Germany, the UK and the USA, ad-hoc for Brazil & China). Target: people aged 16-64 (18-64 in the USA).

National representative quotas are used, weighting quotas to ensure sample representativeness.

This document also includes historical results of:

IPSOS surveys commissioned by UEBT: September 2010, 1000 consumers in Japan, October 2011, IPSOS survey commissioned by UEBT amongst 1000 consumers in South Korea, February 2012, India, Peru, Switzerland. All interviews conducted through internet, except for Peru (telephone) and India (face to face).

Top 100 beauty companies:

UEBT analysis of annual reports, CSR reporting and web-sites of the top 100 beauty companies (source WWD 2012) and top 100 food and beverage companies.

The Biodiversity Barometer was undertaken with the support of:



Contact UEBT

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